

Early Bird  
Registration  
Available until  
March 8,  
2006!

Establishing NAELA members as the premier providers of legal advocacy, guidance and services to enhance the lives of people with special needs and people as they age.

# Capital Ideas in Elder Law

2006 NAELA Symposium  
Hyatt Regency Washington on Capitol Hill

April 20-23, 2006 / PreSessions - April 19, 2006





## Invitation to Attend

NAELA's mission has been to help make you a premier provider of legal advocacy and guidance and services to enhance the lives of people with special needs and people as they age. We hope you'll join us for the opportunity to expand our practice skills in court and fair hearing advocacy, learn how to work within new federal requirements, and learn how to better protect and advise our clients. Find out how to organize your retirement, expand your practice, get the advantage in your state of a state Chapter and learn how to be a more effective advocate with legislators for seniors and clients with special needs.

Betsy Angevine, Esq.,  
*2006 NAELA Symposium Chair*

### Washington D.C.

The American experience awaits you in Washington, D.C. – a cosmopolitan city with world-class restaurants run by all-star chefs, celebrated theaters, awe-inspiring memorials, dynamic nightlife and hip neighborhoods. At the Smithsonian Institution's 14 museums, you can sample science, art and history. Beyond the National Mall, a world of smaller museums, galleries and historic homes await the adventurous. Thanks to a safe and reliable Metrorail system and the newly-inaugurated Circulator bus system, D.C.'s attractions are easily-accessible from all parts of the city. To request a visitor's guide or for more information on all there is to see and how to make the most of your time in the nation's capital, visit [www.washington.org](http://www.washington.org)

### Special Thanks to the 2006 NAELA Symposium Steering Committee & 2005- 2006 Special Interest Group (SIG) Chairs

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Suwanee, GA

Edward Zetlin, Esq.  
Guardianship SIG Chair

2006 Fundamentals of Elder Law Day Chair  
Reginald H. Turnbull, CELA  
Jefferson City, MO

2006 NAELA Review Course Chair  
Fay Blix, CELA  
Laguna Hills, CA

## Hotel Information

### Hyatt Regency Washington on Capitol Hill

400 New Jersey Ave. NW  
Washington, D.C. 20001  
(202) 737-1234 Phone

[www.washingtonregency.hyatt.com](http://www.washingtonregency.hyatt.com)

The host hotel for the 2006 Symposium is located just two blocks from the U.S. Capitol, Congressional office buildings, U.S. Supreme Court, Library of Congress, Amtrak's Union Station and Washington Metro subway.

Newly renovated rooms feature modern furnishings that complement the elegant bath and "Grand Beds" with plush pillows, soft sheeting and thick down blankets piled upon irresistible pillow-top mattresses. Enjoy wireless Internet access, on-demand programming, cordless phone and easy video checkout.

A special conference rate of \$209.00 per room (single or double occupancy) plus tax is available for all attendees **on a first-come, first-served basis and cannot be guaranteed after March 8, 2006**. Reservations must be guaranteed with a credit card or one night's room and tax deposit at the time of booking.

To make your reservations, simply contact the hotel at **(800) 233-1234** or visit

[www.washingtonregency.hyatt.com](http://www.washingtonregency.hyatt.com) and be sure to mention that you are with NAELA and/or type in "NAE1" in the Reservation Code Box on-line.

## Airline/Rail Service Information

Navigant International at (800) 229-8731 can assist you with airline reservations in and out of Washington's Ronald Reagan National Airport, Washington Dulles, Baltimore/Washington International Airports or rail service on Amtrak. Let them know that you are attending the NAELA Symposium as special discount fares have been negotiated for some airlines, which are not available through other travel agents. Navigant can also assist you with hotel and car rental arrangements. Please note: As with any travel agency, service fees will apply.

## How Do I Get There?

### From/To Ronald Reagan National Airport (DCA): The Hyatt Regency Washington on Capitol Hill is just 10-15 minutes away. Taxis

are available outside baggage claim for approximately \$14-\$18. The **Union Station Metro Stop** is located 3 blocks from the hotel. From the Airport, take the Yellow/Blue line, in the direction of Mount Vernon Square and at Gallery Place/Chinatown, transfer to the Red line on the upper level, in the direction of Silver Spring/Glenmont. Union Station is the 2nd stop. Approximate fare is \$1.35 - \$1.75 (20-25 min) Hours are: 5:30 a.m.- 12:00 a.m. (Mon-Fri) and 8:00 a.m.-12:00 a.m. (Sat & Sun).

**SuperShuttle** is located outside baggage claim at Ground Transportation and available 7 days a week for approximately \$13 one way. Shuttles make multiple stops and drop off directly at the hotel.

Advance reservations may be made by calling **800-BlueVan (800-258-3826)** or online at [www.supershuttle.com](http://www.supershuttle.com)

### From/To Dulles International Airport (IAD): The Hyatt Regency on Capitol Hill is approximately 50 minutes away. Taxis

are available on the lower level, outside baggage claim for approximately \$60-\$80. **SuperShuttle:** Is located outside baggage claim at Ground Transportation and available 7 days a week for approximately \$26 one way. Shuttles make multiple stops and drop off directly at the hotel. Advance reservations may be made by calling **800-BlueVan (800-258-3826)** or online at [www.supershuttle.com](http://www.supershuttle.com)

### From/To Baltimore/Washington Airport (BWI): The Hyatt Regency on Capitol Hill is approximately 60 minutes away. Taxis

are available on the lower level, outside baggage claim for approximately \$63.

**MARC Train:** (a commuter train) runs from BWI to Union Station (2 blocks from the hotel) for approximately \$7 one way. The MARC train *ONLY* runs on weekdays. **SuperShuttle** is located outside baggage claim at Ground Transportation and available 7 days a week for approximately approximate fare is \$31 one way (\$11 for additional passengers in same party). See below for more information. Shuttles make multiple stops and drop off directly at the hotel. Advance reservations may be made by calling **800-BlueVan (800-258-3826)** or online at [www.supershuttle.com](http://www.supershuttle.com)

**From/To Amtrak/Union Station:** The **Hyatt Regency on Capitol Hill** is located 3 blocks from Union Station. Upon arriving at Union Station, follow exit signs to the front of Union Station. From Union Station, take E Street (between the semi-circle of flags) to the intersection of E Street, NW and New Jersey Avenue, NW. The hotel will be directly in front of you.

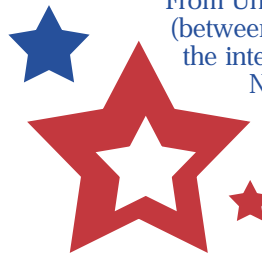
**Taxis** are available outside the main entrance of Union Station. Approximate fare is a \$5.50 base with possible surcharges for additional passengers, luggage, and rush hour or snow emergency.

## Parking

The Hyatt Regency Washington on Capitol Hill offers indoor valet parking for hotel guests at the rate of \$30 per night, plus tax (including in/out privileges). The garage has a clearance of 6 feet. Van & RV parking is available at Union Station (2 blocks from the hotel). For SUV's and Vans, the cost for valet parking is \$35.00 per night, plus tax with limited space available. Self-parking is not available.

## Weather/ Convention Attire

In April, warm weather usually prevails in Washington, D.C. with averages in the high 60's F. To feel as comfortable as possible, we suggest that you dress resort casual (in layers) due to varied temperatures and coastal air. For men, that includes slacks, golf shirts and sweaters. For women, slacks, casual blouses, sweaters or casual dresses are appropriate. A REMINDER: Meeting room temperatures and personal comfort vary widely. If meeting rooms always seem cold to you, please bring a sweater or jacket.



## Old Town Trolley Tours of Washington, D.C.

If your time to sightsee in Washington, D.C. is limited, you may want to consider taking a Trolley Tour! Tour the city in one day including the major museums and monuments. The Trolley runs daily from 9:00 a.m. until 5:30 p.m., makes 15 stops including pick-up and drop off in front of the hotel every 30 minutes. Ticket price: \$28 per person, \$14 for children ages 5-11, free for children under 5. Contact the Hyatt Concierge for additional information and pricing or visit [www.trolleytours.com](http://www.trolleytours.com).

## NAELA Symposium Registration Information

Register on or before **Wednesday, March 8, 2006** to take advantage of the early-bird registration fee of \$595. After this date, the cost of registration will be \$695. On-site registrations (including any received after April 5, 2006) will be \$795. The registration fee includes entrance to all educational sessions, the opening reception, four breakfasts, two lunches and a copy of the conference materials in hard copy or on CD-Rom.

## What's a Spouse/ Guest to Do?

NAELA will be sponsoring an informal continental breakfast on Thursday, April 20<sup>th</sup> from 8:30 a.m. – 9:30 a.m. to give spouses and/or guests of NAELA Symposium attendees a chance to meet and make plans to experience the D.C. area together.

## National Elder Law Foundation (NELF) Certification

**Certification in Elder Law: A Milestone in Your Professional Development**

**The issue:** Specialty designation as a Certified Elder Law Attorney (CELA) is now recognized by the American Bar Association through accredited certification programs.

**The program:** The National Elder Law Foundation's certification program, the only ABA accredited certification program in elder law, will identify you as an attorney who has the enhanced knowledge, skills, experience and proficiency to be properly identified to the public as a Certified Elder Law Attorney (CELA).

**The benefit to you:** Your certification as a CELA will identify you to your peers, other professionals, your clients and the general public as an expert in this field. Certification is open to all who qualify without regard to membership in NAELA, state bar elder law sections, American Bar Association or other legal associations.

For more information on the next exam, contact Lori Barbee, NELF Certification Coordinator, at (520) 881-1076, ext. 120, by fax at (520) 325-7925, or e-mail at lbarbee@naela.com. The application packet includes a short-form application, the board's rules and regulations and an explanation of the certification program.

## NAELA Symposium Pre-Session Events WEDNESDAY, APRIL 19, 2006

8:00 a.m. – 5:00 p.m.

### NAELA Certification Review Course

**Separate Registration Required**

NAELA is offering a certification review course, developed and taught by Certified Elder Law Attorneys. This course is offered for attorneys interested in sitting for the National Elder Law Foundation's Certification Examination. For more information or to register for this course, visit the NELF website at [www.nelf.org](http://www.nelf.org), or contact Lori Barbee, NELF Certification Coordinator at (520) 881-1076, ext. 120, by fax at (520) 325-7925, or e-mail at [lbarbee@naela.com](mailto:lbarbee@naela.com). The registration fee of \$250 includes a set of materials and lunch.

8:00 a.m. - 5:30 p.m.

### The Advocacy Litigation SIG Presents "The Compelling Advocate" Pre-Session

**Separate Registration Required**

**Become the Powerful and Compelling Advocate You Have Wanted to Be!!** If you have previously refused cases that could potentially involve an appearance before a jury, judge or commissioner because you believed that you lacked the skills to effectively present your case, this is the seminar for you! Build the confidence you need to effectively represent your clients at a trial, hearing, mediation or in any other forum where communication and persuasion is crucial. Or, if you are already a seasoned litigator, learn the skills that will take you to the next level and surpass the competition. By utilizing powerful theater techniques, you will instantly improve and enhance your communication and presentation skills. There will be no lectures in this course - you will immediately apply these invaluable tools to your own cases and learn the secrets of powerful and compelling advocacy. The registration fee of \$200 includes a set of materials and lunch.

8:00 a.m. - 5:40 p.m.

### The Fundamentals of Elder Law

**Separate Registration Required.**

What makes elder law attorneys different? During the Fundamentals Day Pre-session, lawyers new to elder law will learn (and experienced practitioners will refresh themselves with) minimum knowledge fundamentals, which set the practice of elder law apart from other practice areas. Several of NAELA's best and brightest attorneys will present core competencies in at least the following areas: Public Benefits including Social Security retirement, SS disability, SSI, Medicare, and public housing; long-term care planning including LTC insurance and Medicaid with emphasis on the new Federal rules; client capacity and surrogate decision making; how elder law attorneys approach estate planning holistically (including rudimentary tax issues and information on special needs trusts); and practice management and client development to serve the elderly and disabled. Speakers will point out how various subjects often intersect and overlap. For example, asset protection goals may take precedence over usual estate planning to avoid probate but have gift tax consequences. During the day, the experienced speakers will each demonstrate the application of subject area knowledge to scenarios for a single person and a married couple. Participants will have time to discuss the application of what was learned during the day to the scenarios and also receive handouts of power point presentations, glossaries of terms in each area, lists of practice resources, and written subject outlines, texts, and practical forms. The registration fee of \$200 includes a set of materials and lunch.

8:00 a.m. – 8:30 a.m.

### The Fundamentals of Elder Law Schedule

**Welcome and Introduction to Format and Scenarios**

Reginald (Reg) H. Turnbull, CELA, *Jefferson City, MO*

8:30 a.m. – 10:00 a.m.

### Public Benefits (other than Long-Term Care Medicaid)

Thomas D. Begley, Jr., CELA, *Moorestown, NJ*

Thomas D. Begley, Jr., CELA, will describe retirement and disability insurance income benefits for workers, their spouses and dependents; and Supplemental Security Income benefits for the financially-needy elderly and disabled persons. In addition, Mr. Begley will present a brief summary of appeal processes for SSDI and SSI; Medicare Parts A, B, and D benefits; and community Medicaid and public housing benefits.

10:00 a.m. – 10:20 a.m.

### Break

10:20 a.m. – 12:00 p.m.

### Long-Term Care Planning after the Deficit Reduction Act of 2005

Morris Klein, CELA, *Bethesda, MD*

Morris Klein, CELA, will illustrate public policy of personal responsibility to private pay for long-term care; long-term care insurance; and federal and state government eligibility rules for long-term care. He will also describe other medical benefits for the financially-needy elderly and disabled persons, including home-based care waivers, special rules for married persons, lookback-period and transfer-penalty rules, and estate recovery.

12:00 p.m. - 1:40 p.m.

### Lunch and Introductions Office Practice & Client Development

William J. Brisk, CELA, *Newton Center, MA*

William J. Brisk, CELA, will describe how an elder law practitioner can practice efficiently; methods to attract clients; why an elder law practitioner's office should look and feel different from other attorneys' offices; how to "practically" handle ethical issues faced when families become involved with our clients; as well as present sample forms for effective representation.

1:40 p.m. - 2:45 p.m.

### Aging and Capacity Issues

Cynthia L. Barrett, Esq., *Portland, OR*

Cynthia L. Barrett, Esq., will explain the importance of counseling clients about the need to plan for their incapacity; how capacity is assessed for legal document execution and decision-making; and discuss surrogate health care and financial decision-making alternatives, including powers of attorney, guardianships, and conservatorships.

2:45 p.m. – 3:00 p.m.

### Break

3:00 p.m. - 4:15 p.m.

### Estate Planning – Elder Law Style, including Introduction to Tax Consequences

Ruthann P. Lacey, CELA, *Tucker, GA*

Ruthann P. Lacey, CELA, will describe the holistic approach elder law practitioners use when clients and their families plan to facilitate property management and succession of property ownership pending their possible incapacity and certain death, with emphasis on goals to avoid burdening their families, paying probate expenses, and overpaying their tax obligations.

4:15 p.m. - 5:15 p.m.

### Small Group Discussions

In the day's final session, experienced elder law practitioners will lead discussions which enable Fundamentals Day participants to discuss two scenarios – a single person and a married couple – to apply what they have learned throughout the day. Participants will receive a list of recommended resources for use in their own libraries.

5:15 p.m. - 5:40 p.m.

### Report from Small Groups and Adjourn

Reginald (Reg) H. Turnbull, CELA, *Jefferson City, MO*



## 2005-2006 NAELA Board of Directors

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### PUBLIC POLICY CONSULTANT

**Brian W. Lindberg, MMHS**  
Washington, D.C.

### LEGAL COUNSEL

**Hugh K. Webster, Esq.**  
Washington, D.C.

## Special Needs/ Disabilities

NAELA will attempt to meet the special requirements of those with disabilities. Please let us know in advance of such requirements.

## CLE Credit Information

Continuing legal education (CLE) credits will be applied for in all applicable states. The appropriate forms and information will be available at the Symposium.

# Capital Ideas in Elder Law

## 2006 NAELA Symposium Schedule of Events



### WEDNESDAY APRIL 19, 2006

7:00 a.m. – 6:00 p.m.  
**Registration Open**

8:00 a.m. – 5:00 p.m.  
**NAELA Certification  
Review Course**  
Separate Registration Required  
See Page 4 for more information.

8:00 a.m. - 5:30 p.m.  
**Advocacy Litigation  
SIG Pre-Session  
“The Compelling Advocate”**  
Separate Registration Required  
See Page 4 for more information.

8:00 a.m. – 5:40 p.m.  
**Fundamentals of Elder  
Law Pre-Session**  
Separate Registration Required  
See Page 4 for more information.

1:00 p.m. – 5:00 p.m.  
**NAELA Board of  
Directors Meeting**  
NAELA Members Welcome.

6:00 p.m. – 7:00 p.m.  
**State Chapter Cocktail Reception**



### THURSDAY APRIL 20, 2006

7:30 a.m. - 5:00 p.m.  
**Registration Open**

7:45 a.m. – 8:45 a.m.  
**All About NAELA Breakfast**

NAELA’s Membership Committee invites you to join them for a complete overview of the National Academy of Elder Law Attorneys. Become more familiar with NAELA’s history, accomplishments, and operations while learning how you can become more involved in this terrific organization.

8:30 a.m. - 9:30 a.m.  
**Spouse/Guest Hospitality  
Breakfast**

9:00 a.m. - 9:30 a.m.  
**Welcome/Opening Remarks/  
Theresa Award Presentation**

Lawrence E. Davidow, CELA  
2005-06 NAELA President

Elizabethanne (Betsy) Angevine, Esq.  
2006 NAELA Symposium Chair

Vincent J. Russo, CELA  
Islandia, NY

10:00 a.m. – 4:00 p.m.  
**Exhibit Display Hours**

9:30 a.m. – 10:45 a.m.  
**Opening Keynote Address**

**How America Can Afford to Grow  
Older: A Vision for the Future**

William Novelli - Invited  
*Washington, D.C.*

10:45 a.m. – 11:15 a.m.  
**Break/Visit with Exhibitors**

11:15 a.m. – 12:30 p.m.  
**General Session**

**How Congress Really Works the  
Legislative Process and More**

Judy Schneider - Invited  
*Washington, D.C.*

12:30 p.m. - 2:30 p.m.  
**NAELA Annual Business  
Meeting Luncheon**  
Included in Registration Fee  
All NAELA Attendees Welcome

2:45 p.m. – 4:45 p.m.  
**Joint General Session with  
National Aging and Law  
Conference (NALC)  
Town Hall Discussion with CMS  
(Invited) on Medicare Part D**

3:45 p.m. – 4:15 p.m.  
**Break/Visit with Exhibitors**

5:00 p.m. – 6:00 p.m.  
**NALC Post Town Hall Follow Up**

5:00 p.m. – 6:00 p.m.  
**Public Policy/SR-PAC Happy  
Hour**

6:00 p.m. – 7:00 p.m.  
**Friends of Bill W. Meeting**

6:00 p.m. – 8:00 p.m.  
**NAELA/NALC Joint Reception**

### Track Logo Key



*Advocacy Track*



*Guidance & Services Track*



*Our Own Practices Track*



**FRIDAY**  
APRIL 21, 2006

8:00 a.m. - 2:00 p.m.  
**Registration Desk Open**

8:15 a.m. - 9:15 a.m.  
**Special Interest Group (SIG) Breakfasts**

The **NAELA Guardianship/Capacity SIG** invites you to join them for breakfast featuring an open microphone format on the hot topic of "Interstate Jurisdictional Issues and NCCUSL." Steering committee members will brief the attendees on Interstate Jurisdictional Issues before opening it up to the floor.

The **NAELA Trust SIG** invites you to join them for breakfast featuring a panel presentation on "Developing the Trust Practice Resource Library." Attendees will be asked to identify their favorite Trust library resource prior to the Symposium and a list will be available as a handout at the breakfast session.

8:15 a.m. - 9:15 a.m.  
**NAELA SR-PAC Recognition Breakfast**

8:00 a.m. - 12:30 p.m.  
**Exhibit Display Times**

9:30 a.m. - 10:45 a.m.  
**General Session**

**Medicaid Reform: The Deficit Reduction Act and How to Help Your Clients Through an Unnatural Disaster**

Vincent J. Russo, CELA  
*Islandia, NY*

Whitney M. Lewendon, Esq.  
*New Haven, CT*

Patricia Nemore, Esq.  
*Mansfield, CT*

Ira S. Wiesner, CELA  
*Sarasota, FL*

10:45 a.m. - 11:15 a.m.  
**Break/Visit with Exhibitors**

*(continued on page 8)*

**Optional Events**  
FRIDAY, APRIL 21, 2006  
*Separate Registration Required for All*

2:00 p.m. - 5:00 p.m.  
**Volunteer Advocate Training: Giving Voice to Your Legislative Message**

Become part of a volunteer core who commits to contacting legislators on a regular basis about the issues of people with special needs and people as they age. Join us as we learn the do's and don'ts of effective communication with legislators and their staff. Learn some tips on how to motivate your clients to want to advocate for their own issues and to communicate with their legislators. Learn from Brian Lindberg and members who have had success in educating and motivating legislators.  
*Please note: pre-registration for this program IS required, however there will be no registration fee collected.*

5:30 p.m. - 8:00 p.m.  
**Farewell Dinner for Laury Adsit Gelardi at the Hyatt Regency Washington on Capitol Hill**

**\$80.00 per person**  
*Includes dinner. Cash bar available. Separate Registration Required*

Join us as we congratulate Laury Adsit Gelardi, NAELA's Executive Director since 1989, on her retirement and thank her for all she has done for NAELA. Laury has been an integral part of the NAELA family - mother to some, sister to others and a friend to all - all the while supporting our dreams and energizing our efforts. This evening will provide us all with an opportunity to send her off in style!

**Capitol Steps Musical Comedy Troupe**  
**NAELA SR-PAC Fundraiser at the Hyatt Regency Washington on Capitol Hill**

8:30 p.m. - 9:30 p.m.  
**Cost: \$75 per ticket**  
**Includes performance. Cash bar available.**

Back by popular demand! Join us for an entertaining evening with the celebrated Capitol Steps while supporting the fundraising efforts of the NAELA SR-PAC! The Capitol Steps, a political satire musical troupe, have been performing their special brand of political satire since 1981. They acquired their start when three senate staffers were asked to provide entertainment for a holiday party. Instead of staging a traditional play, the group decided to dig into the headlines and hot topics of the day, creating new lyrics for familiar tunes. What emerged was a special brand of satirical humor that plays well on Pennsylvania Avenue and has enjoyed an ever-increasing audience. Catch their act as they present a special performance for NAELA members at the Symposium.

Over the past twenty years, the Capitol Steps have recorded twenty-four albums, and appeared on "Good Morning America," the "Today Show," "20/20," "Entertainment Tonight," "Nightline," CNN's "Inside Politics," and National Public Radio's "All Things Considered."

For the past fifteen years, they've produced quarterly specials for public radio and have been featured in three national specials for public television. They've performed for five U.S. Presidents (six if you include Hillary.)

The Capitol Steps were Voted #1 on WashingtonPost.com's Best Bets 2005 Readers' Choice Award for Live Theater.

You'll be sorry if you miss it!

**Capitol Steps: The only group in America that attempts to be funnier than the Congress! Come and support the NAELA SR-PAC!**



Friday, April 21

(continued from page 7)

11:15 a.m. – 12:30 p.m.  
**Breakout Sessions**



**Walter Mitty Goes to Court:  
Section 1983 for Non-Litigators**

Rene H. Reixach, Esq.  
Rochester, NY

Ron M. Landsman, Esq.  
Rockville, MD

Stanley M. Vasiliadis, CELA  
Bethlehem, PA

This session will show the knowledgeable Medicaid lawyer how to assess and develop a class action suit under Section 1983.



**Bankruptcy and the Elderly: Why  
Our Clients are Filing for  
Bankruptcy and How  
Bankruptcy Abuse and the  
Consumer Protection Act of 2005  
Will Impact Them**

Prof. Rebecca Morgan, Esq.  
Gulf Port, FL

Dean Theresa J. Pulley Radwan, Esq.  
Gulf Port, FL

This session will discuss the frequency with which elders are filing for bankruptcy, the causes of bankruptcy filings by the elderly and how the changes to the bankruptcy code will impact them.



**Veteran's Services Available for the  
Elder or Disabled Client/  
Obtaining Income through the VA  
to Help Pay for Long-Term Care  
Expense**

Meg Bartley, Esq.  
Washington, D.C.

Kenneth M. Carpenter, Esq.  
Topeka, KS

Victoria L. Collier, Esq.  
Decatur, GA

Felicia Pasculli, Esq.  
Bay Shore, NY

This session will stress that learning of a client's status as a veteran is an essential component of any practice serving disabled and/or elderly clients. Failure to consider the availability of potential benefits may cause clients to unnecessarily expend funds on healthcare needs or long-term care plans. Recognition of the importance of the client's contribution as a veteran as well as knowledge of the eligibility criteria for such benefits, are appreciated by the client and serve to foster a more productive and trusting relationship between the client and attorney.

12:30 p.m.  
**Free Afternoon  
Optional Events**



1:00 p.m. – 5:00 p.m.

**Law School Student Fellowship**

In an effort to expose law students to the practice of elder law, NAELA has instituted the NAELA Law Student Fellowship Program in conjunction with the 2006 Symposium. Members of NAELA will be instructing these students on the basics of elder law in hopes of increasing the awareness of elder law as a legal discipline the students may wish to pursue in their career. NAELA will be hosting these local law school professors and law students for an afternoon to experience the philosophy and developments within the elder law community. For more information on this program, please contact Vickie Palmer at the NAELA Office at (520) 881-4005 x103.

2:00 p.m. – 5:00 p.m.

**Volunteer Advocate Training: Give  
Voice to Your Legislative Message**

Separate Registration Required  
*See Page 7 for more information.*

5:30 p.m. – 8:00 p.m.

**Farewell Dinner for  
Laury Adsit Gelardi**

Separate Registration Required  
*See Page 7 for more information*

8:30 p.m. – 9:30 p.m.

**Capitol Steps Musical  
Comedy Troupe**

NAELA SR-PAC Fundraiser  
Separate Registration Required.  
*See Page 7 for more information*



**SATURDAY**  
APRIL 22, 2006

8:00 a.m. - 5:00 p.m.

**Registration Open**

8:15 a.m. - 9:15 a.m.

**Special Interest Groups (SIG)  
Breakfasts**

The **NAELA Health Care SIG** invites you to join them for breakfast and an informative follow-up to George Felos' presentation at the 2005 Joint Institute in Tucson, AZ — whose take home message to his audience was — "this could happen to you." Featured guest speaker, Debbie Bushnell, Esq., from Dunedin, FL was involved in writing the appeal briefs for the Schiavo case.

The **NAELA Advocacy/Litigation SIG** invites you to join them for an informal networking breakfast featuring roundtable discussions on advocacy issues.

8:15 a.m. - 9:15 a.m.  
**NAELA SR-PAC Board of Directors Meeting**

9:00 a.m. - 4:00 p.m.  
**Exhibit Display Times**

9:30 a.m. - 10:45 a.m.  
**General Session**

**Case Law Update**

Robert B. Fleming, CELA  
Tucson, AZ

Prof. Rebecca Morgan, Esq.  
Gulf Port, FL

Join us for a discussion of recent statutory and case law developments in elder law.

10:45 a.m. - 11:15 a.m.  
**Break/Visit with Exhibitors**

11:15 a.m. - 12:30 p.m.  
**Breakout Sessions**



**Medicare Appeals: New Rules and Practice – Experiences and Lessons Learned**

Alfred J. Chiplin, Jr., Esq.  
Washington, D.C.

Pamela A. Meliso, Esq.  
Mansfield, CT

Brad S. Plebani, Esq.  
Mansfield, CT

Judith A. Stein, Esq.  
Mansfield, CT

This workshop will describe the new combined Medicare Part A and B Appeals process; the expedited appeals process for Traditional (or Original) Medicare claims, involving Skilled Nursing Facilities, Home Health, Hospice, Comprehensive Outpatient Rehabilitation Facility Services (CORF); and changes to the Administrative Law Judge (ALJ) hearings process for all Medicare claims, including coordinated care claims (Medicare Part C), and the prescription drug benefit (Medicare Part D). We will also discuss new rules for attorneys' fees.



**Planning Your Own Retirement: You Can't Start too Soon**

Thomas D. Begley, Jr., CELA  
Moorestown, NJ

This session will address issues in retirement planning for lawyers, including sale of the practice, retirement accounts, amounts needed for retirement, and acquisition of special assets.



**Hot Topics – Too Hot to Print**

This session is being reserved for the hottest topic facing elder law attorneys at the time of the Symposium. An announcement on this session may be made as late as the Opening Session of the 2006 NAELA Symposium.

12:30 p.m. - 1:45 p.m.  
**Networking Luncheon**

12:30 p.m. - 1:45 p.m.  
**Chapter Presidents' Luncheon**  
By Invitation Only

12:30 p.m. - 1:45 p.m.  
**Special Interest Groups Chair Luncheon**  
By Invitation Only

12:30 p.m. - 1:45 p.m.  
**NELF Board of Directors Luncheon**  
By Invitation Only

2:00 p.m. - 3:15 p.m.  
**Breakout Sessions**



**How to Try a Lawsuit to Increase the Medicaid Spousal Allowances**

David L. McGuffey, CELA  
Dalton, GA

Timothy L. Takacs, CELA  
Hendersonville, TN

H. Todd Whatley, Esq.  
Bryant, AR

Rebecca H. Winburn, Esq.  
Little Rock, AR

Recent changes to the Medicaid statutes may fundamentally affect planning for the long-term care needs of married couples, one of whom is institutionalized. As

Congress continues to close the Medicaid eligibility gates, Medicaid planning practice is being transformed from a transactional practice to transactions-plus-litigation practice. This transformation will force many Medicaid planning attorneys with an exclusively transactional practice to counsel clients on litigation strategies for increasing community spousal allowances. This presentation will demonstrate how to litigate a Medicaid spousal allowances case. Written materials will give practitioners a "soup-to-nuts" understanding of the process. Forms will be included.



**Guiding Your Client to Get the Best Tax Breaks in Caregiving**

Robert M. Morgan, Esq.  
Jacksonville, FL

Ruth A. Phelps, CELA  
Pasadena, CA

David Lee Rice, CELA  
Torrance, CA

This session will enable you to alert caregivers to the income tax treatment of qualified long-term care services and facility costs as medical deductions, and personal exemptions for dependents.



**Mediation Advocacy: Is This an Oxymoron or a Less Stressful, Successful Way to Practice Law**

Prof. Katherine C. Pearson, Esq.  
Carlisle, PA

Edward M. Phelps, Esq.  
Pasadena, CA

Do you shy away from handling "lawsuits" because you dislike being in court and hate wasting years on messy court documents? Learn why you should incorporate mediation into your practice. See real examples of how to get things done in mediation. What works and what doesn't. Learn why mediation is the fastest growing dispute resolution process in the United States — and why your clients will be asking you about applying it to their controversies.

3:15 p.m. - 3:45 p.m.  
**Break/Visit with Exhibitors**

*(continued on page 10)*

**Saturday, April 22**

*(continued from page 9)*

3:45 p.m. – 5:00 p.m.

**Breakout Sessions**



**Consumer Frauds Targeting Older Consumers – Research, Education & Litigation**

Sally Hurme, Esq.  
Washington, D.C.

Prof. Rebecca Morgan, Esq.  
Gulf Port, FL

This session will discuss the various financial scams targeting NAELA clients (with emphasis on investment scams), demonstrate various educational techniques to help clients learn how to protect themselves, and the issues in litigating these cases when prevention fails.



**The Curious Case of the Persistent Step-Up: In Which Mysterious Basis Rules Concerning Joint Tenancies and Life Estates are Unveiled and Explicated**

John B. Payne, Esq.  
Wexford, PA

This session will explain the tax principles that govern whether property will have stepped-up basis on the death of the owner.



**NAELA Chapters and Your State: What NAELA Chapters Can Mean for You**

Frank J. Dana, CELA  
Greenville, SC

Michael F. Loring, Esq.  
Scituate, MA

Donna Rainville  
Tucson, AZ

NAELA Chapter Presidents and NAELA Staff will present a forum on how to form a new state chapter in your state, how NAELA can help you get started, and how state chapters can help you in your practice.

7:00 p.m.

**Dine-Arounds**

Hosted by the Maryland/D.C. Chapter



**SUNDAY**  
*APRIL 23, 2006*

8:00 a.m. - 11:00 a.m.

**Registration Desk Open**

8:00 a.m. - 9:00 a.m.

**Special Interest Group (SIG) Breakfasts**

The **NAELA Tax SIG** invites you to join them for an informal networking roundtable breakfast featuring discussions on: (1) Tax Tips, (2) New Tax Laws, (3) Tax Aspects of Annuities, (4) Snowbird Considerations and (5) Tax Considerations for Family Care Contracts.

The **NAELA PD/PM SIG** invites you to join them for breakfast featuring a panel presentation on the Life Care Approach model: (1) Adapting practices now to say that elder law is more than just protecting your assets from the government; (2) How do I afford a \$60,000 salary for a geriatric care manager and a social worker while this model takes off; (3) What does the job description look like; and (4) How do you actually do it?

9:15 a.m. – 10:45 a.m.

**General Session**  
**Mock Trial: Appointment of a Guardian Against the Alleged Incapacitated Person's Wishes**

Christine A. Alsop, Esq.  
St. Louis, MO

Donna R. Bashaw, CELA  
Laguna Hills, CA

William J. Brisk, CELA  
Newton Center, MA

Victoria E. Heuler, Esq.  
Tallahassee, FL

Steven C. Perlis, CELA  
Chicago, IL

G. Mark Shalloway, CELA  
West Palm Beach, FL

Shirley Berger Whitenack, Esq.  
Morristown, NJ

Edward E. Zetlin, Esq.  
Falls Church, VA

The NAELA Advocacy/Litigation and Guardianship/Capacity Special Interest Groups (SIGs) have pooled their talent to develop this presentation which involves many of the people who presented the mock hearing on the qualification of an expert witness at the 2004 Symposium.

10:45 a.m. – 11:00 a.m.

**Closing Remarks**

Lawrence E. Davidow, CELA  
2005-06 NAELA President

Elizabethanne (Betsy) Angevine, Esq.  
2006 NAELA Symposium Chair

**Save the Date!**

Watch your mail for information on the  
**2006 ADVANCED ELDER LAW INSTITUTE**  
**November 2-5, 2006**  
**The Grand America Hotel**  
**Salt Lake City, UT**

*Check out the website at*  
***www.naela.org*** for more information.

# Registration Form

**Early Bird Registration Available until March 8, 2006!**

<b>For Office Use Only</b>	
Amt \$ _____	Type _____
Date _____	Order # _____

Name \_\_\_\_\_ Nickname (for Badge) \_\_\_\_\_

Business Name \_\_\_\_\_ Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

E-mail: \_\_\_\_\_

Preferred method for receiving/acknowledgment of registration:  E-mail  Fax

### In case of an on-site emergency, please contact:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Relationship to You: \_\_\_\_\_

I have a special need/disability that may require specific accommodations in order for me to fully participate. Please contact me.

Dietary Need:  Vegetarian  Kosher

Is this your first time to attend a NAELA program?  Yes

## 2006 Symposium Registration Fees

April 20-23, 2006	On/Before		After
	3/8/06	3/8/06	
NAELA Member .....	\$595 .....	\$695 .....	\$ _____
LSC/Title III Attorney .....	\$375 .....	\$475 .....	\$ _____
Non-Member Attorneys .....	\$795 .....	\$895 .....	\$ _____

Please note: No registrations will be processed after April 5, 2006. On-site/walk-in registrations will be subject to \$100 late fee.

## Materials

Symposium materials will be made available on-site. Please check which format you prefer to receive your materials in (if no box is marked, the 3-ring binder will be provided for you):

- 3-Ring Binder
- CD-ROM
- Both - Add \$50.00 .....

## Pre-Sessions

Wednesday, April 19, 2006  
Separate Registration Required

### NAELA CELA Review Course

Contact Lori Barbee. See Page 4 for details.

### Advocacy Litigation SIG:

The Compelling Advocate ..... \$200 ..... \$300 ..... \$ \_\_\_\_\_  
8:00 a.m. – 5:30 p.m.

Fundamentals of Elder Law ... \$200 ..... \$300 ..... \$ \_\_\_\_\_  
8:00 a.m. – 5:40 p.m.

<h2>3 Easy Ways to Register</h2>	1. By Mail to:	2. By Fax to:
	NAELA 2006 Symposium	(520) 325-7925
	1604 N. Country Club Rd. Tucson, AZ 85716-3102	
	3. OnLine at:	
	www.naela.org	

## Optional Events

Friday, April 21, 2006  
Tickets must be purchased by everyone who would like to attend optional events. Space is limited.

### 2:00 p.m. – 5:00 p.m.

Yes, please register me for the Volunteer Advocate Training: Giving Voice to Your Legislative Message. Please note, registration for this session IS required, although there is no registration fee.

### 5:30 p.m. – 8:00 p.m.

Farewell Dinner for Laury Adsit Gelardi  
\_\_\_\_\_ # of tickets at \$80.00 each ..... \$ \_\_\_\_\_  
Please indicate your entrée request (s)  
\_\_\_ Beef \_\_\_ Chicken \_\_\_ Vegetarian

### 8:30 p.m. – 9:30 p.m.

Capitol Steps Musical Comedy Troupe  
\_\_\_\_\_ # of tickets at \$75.00 each ..... \$ \_\_\_\_\_

## Meal Tickets for Guests

All of the following meals are included in the full registration fee. Meal tickets only need to be purchased for guests accompanying you to a meal function.

Guest Name: \_\_\_\_\_

### Thursday, April 20, 2006

Breakfast \_\_\_\_\_ # of tickets at \$40.00 each ..... \$ \_\_\_\_\_  
Lunch \_\_\_\_\_ # of tickets at \$60.00 each ..... \$ \_\_\_\_\_  
Opening Reception \_\_\_\_\_ # of tickets at \$50.00 each ..... \$ \_\_\_\_\_

### Friday, April 21, 2006

Breakfast \_\_\_\_\_ # of tickets at \$40.00 each ..... \$ \_\_\_\_\_

### Saturday, April 22, 2006

Breakfast \_\_\_\_\_ # of tickets at \$40.00 each ..... \$ \_\_\_\_\_  
Lunch \_\_\_\_\_ # of tickets at \$60.00 each ..... \$ \_\_\_\_\_

### Sunday, April 23, 2006

Breakfast \_\_\_\_\_ # of tickets at \$40.00 each ..... \$ \_\_\_\_\_

Total Amount Enclosed .....	\$ _____
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**Please complete the registration form and return with a check payable to NAELA or charge below to:**

VISA/MC/AMEX \_\_\_\_\_

Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

Print Card Holder's Name \_\_\_\_\_

**Refund Policy:** No refunds will be issued after April 5, 2006, however, cancellations will receive written materials. Cancellations before that date will receive a refund minus a \$50 administrative fee. Substitutions are welcome. Changes or cancellations must be made in writing to Jenifer Mowery at the NAELA office.

**National Academy of Elder  
Law Attorneys, Inc.™**

1604 N. Country Club Road  
Tucson, Az 85716-3102

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(continued from page 11)

## Breakout Sessions Selections

Full conference registrants can attend all of the sessions and regular meal functions including Special Interest Group (SIG) Breakfasts at no additional charge. Your assistance in indicating which sessions you plan to attend will help the NAELA staff in the planning process to ensure your comfort and enjoyment at the conference. Please note that these selections are not final commitments. You are not required to attend the sessions that you indicate on this registration form.

### Friday, April 21, 2006

**8:15 a.m. - 9:15 a.m.**

#### **Special Interest Group (SIG) Breakfasts**

- NAELA Guardianship/Capacity SIG “Interstate Jurisdictional Issues and NCCUSL”
- NAELA Trust SIG “Developing the Trust Practice Resource Library.”

**11:15 a.m. - 12:30 p.m.**

#### **Breakout Sessions**

- Walter Mitty Goes to Court: Section 1983 for Non-Litigators
- Bankruptcy and the Elderly: Why Our Clients are Filing for Bankruptcy and How Bankruptcy Abuse and the Consumer Protection Act of 2005 Will Impact Them
- Veteran’s Services Available for the Elder or Disabled Client/Obtaining Income through the VA to Help Pay for Long-Term Care Expense

### Saturday, April 22, 2006

**8:15 a.m. - 9:15 a.m.**

#### **Special Interest Groups (SIG) Breakfasts**

- NAELA Health Care SIG featuring Debbie Bushnell, Esq.
- NAELA Advocacy/Litigation SIG Networking Breakfast

**11:15 a.m. - 12:30 p.m.**

#### **Breakout Sessions**

- Medicare Appeals: New Rules and Practice – Experiences and Lessons Learned
- Planning Your Own Retirement: You Can’t Start too Soon
- Hot Topics – Too Hot to Print!

**2:00 p.m. - 3:15 p.m.**

#### **Breakout Sessions**

- How to Try a Lawsuit to Increase the Medicaid Spousal Allowances
- How to Justify Payments to Family Members for Services to Senior Citizens/  
Tax Considerations of Family Care Contracts/Tax Breaks for Caregivers
- Mediation Advocacy: Is This an Oxymoron or a Less Stressful, Successful Way to Practice Law?

**3:45 p.m. - 5:00 p.m.**

#### **Breakout Sessions**

- Consumer Frauds Targeting Older Consumers – Research, Education & Litigation
- The Curious Case of the Persistent Step-Up: In Which Mysterious Basis Rules Concerning Joint Tenancies and Life Estates are Unveiled and Explicated
- NAELA Chapters and Your State: What NAELA Chapters Can Mean for You

### Saturday, April 23, 2006

**8:00 a.m. - 9:00 a.m.**

#### **Special Interest Group (SIG) Breakfasts**

- NAELA Tax SIG Networking Roundtable
- NAELA PD/PM SIG Life Care Approach Model Panel